

SOLICITATION NUMBER TIRNO-04-R-00017
PART IV - REPRESENTATIONS AND INSTRUCTIONS
SECTION L - INSTRUCTIONS, CONDITIONS, AND NOTICES TO OFFERORS

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L.1 52.252-1 SOLICITATION PROVISIONS INCORPORATED BY REFERENCE (FEB 1998)

This solicitation incorporates one or more solicitation provisions by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make their full text available. The offeror is cautioned that the listed provisions may include blocks that must be completed by the offeror and submitted with its quotation or offer. In lieu of submitting the full text of those provisions, the offeror may identify the provision by paragraph identifier and provide the appropriate information with its quotation or offer. Also, the full text of a solicitation provision may be accessed electronically at this/these address(es): <http://www.arnet.gov/far/>

L.2 FAR PROVISIONS AND CLAUSES INCORPORATED BY REFERENCE

L.2.1 52.204-6 DATA UNIVERSAL NUMBERING SYSTEM (DUNS) NUMBER (OCT 2003) (Reference 4.603(a))

L.2.2 52.215-1 INSTRUCTIONS TO OFFERORS--COMPETITIVE ACQUISITION (Jan 2004) (Reference 15.209(a))

L.2.3 52.215-16 FACILITIES CAPITAL COST OF MONEY (June 2003) (Reference 15.408)

L.2.4 52.219-24 SMALL DISADVANTAGE BUSINESS PARTICIPATION PROGRAM – TARGETS (OCT 2000)

L.2.5 52.222-24 PREAWARD ON-SITE EQUAL OPPORTUNITY COMPLIANCE REVIEW (FEB 1999) (Reference 22.810(c))

L.2.6 52.222-46 EVALUATION OF COMPENSATION FOR PROFESSIONAL EMPLOYEES (FEB 1993) (Reference 22.1103)

L.3 52.216-1 TYPE OF CONTRACT (APR 1984)

The Government contemplates award of an Indefinite-Delivery, Indefinite-Quantity (ID/IQ) contract resulting from this solicitation.

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L.4 52.233-2 SERVICE OF PROTEST (July 2002)

- (a) Protests, as defined in section 33.215 of the Federal Acquisition Regulation, that are filed directly with an agency, and copies of any protests that are filed with the General Accounting Office (GAO), shall be served on the Contracting Officer (addressed as follows) by obtaining written and dated acknowledgment of receipt from:

Internal Revenue Service
Robert W. Niedzwiecki, Contracting Officer
Constellation Centre, 5th Floor (OS:A:P:C:T:C)
6009 Oxon Hill Road
Oxon Hill, MD 20745

- (b) The copy of any protest shall be received in the office designated above within one day of filing a protest with the GAO.

(End of provision)

L.5 52.237-10 IDENTIFICATION OF UNCOMPENSATED OVERTIME (OCT 1997)

- (a) *Definitions.* As used in this provision-- "Uncompensated overtime" means the hours worked without additional compensation in excess of an average of 40 hours per week by direct charge employees who are exempt from the Fair Labor Standards Act. Compensated personal absences such as holidays, vacations, and sick leave shall be included in the normal work week for purposes of computing uncompensated overtime hours. "Uncompensated overtime rate" is the rate that results from multiplying the hourly rate for a 40-hour workweek by 40, and then dividing by the proposed hours per week. For example, 45 hours proposed on a 40-hour work week basis at \$20 per hour would be converted to an uncompensated overtime rate of \$17.78 per hour ($\$20.00 \times 40 \text{ divided by } 45 = \17.78).
- (b) For any proposed hours against which an uncompensated overtime rate is applied, the Offeror shall identify in its proposal the hours in excess of an average of 40 hours per week, by labor category at the same level of detail as compensated hours, and the uncompensated overtime rate per hour, whether at the prime or subcontract level. This includes uncompensated overtime hours that are in indirect cost pools for personnel whose regular hours are normally charged direct.

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- (c) The Offeror's accounting practices used to estimate uncompensated overtime must be consistent with its cost accounting practices used to accumulate and report uncompensated overtime hours.
- (d) Proposals that include unrealistically low labor rates, or that do not otherwise demonstrate cost realism, will be considered in a risk assessment and will be evaluated for award in accordance with that assessment.
- (e) The Offeror shall include a copy of its policy addressing uncompensated overtime with its proposal.

(End of provision)

L.6 DTAR 1052.219-70 SF 294 AND SF 295 REPORTING (MAR 2002)

In accordance with the clause entitled "Small, Small Disadvantaged and Women-Owned Small Business Subcontracting Plan" in section I and the contract schedule, SF 294 and SF 295 reports shall be submitted to the following personnel:

ADDRESSEE	SUBMIT SF 294	SUBMIT SF 295
Contracting Officer (address shown on front of contract)	Original	Original
Small Business Program Office Office, Ms. Jodie Paustian, OS:A:P:P 6009 Oxon Hill Road, Suite 800 Oxon Hill, MD 20745	Copy	Copy
Department of the Treasury Director, Office of Small Business Development 1500 Pennsylvania Avenue, NW Mail Code 655-15 th /6099 Washington, DC 20220	N/A	Copy

L.7 DTAR 1052.219-71 SUBCONTRACTING PLAN (MAR 2002)

As part of its initial proposal, each large business offeror shall submit a subcontracting plan, as prescribed in FAR 52.219-9. Use of the subcontracting plan outline contained in Section J, Attachment J.5 of this solicitation is optional, however, plans must contain all elements included in the outline.

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L.8 DTAR 1052.219-73 DEPARTMENT OF THE TREASURY MENTOR PROTÉGÉ PROGRAM (JAN 2000)

Large and small businesses are encouraged to participate in the Department of the Treasury Mentor-Protégé Program. Mentor firms provide small business protégés with developmental assistance to enhance their business capabilities and ability to obtain federal contracts.

Mentor firms are large prime contractors or eligible small businesses capable of providing developmental assistance. Protégé firms are small businesses, as defined in 13 CFR 121, 124, and 126.

Developmental assistance is technical, managerial, financial, and other mutually beneficial assistance to aid protégés. Contractors interested in participating in the Program are encouraged to contact the Department of the Treasury OSBD or the Bureau of the OSBD for further information.

OFFERS SUBMISSIONS SHOULD BE INCLUDED IN VOLUME I.

L.9 MULTIPLE AWARDS

The Government intends to award multiple contracts in each of the Principle Task Areas described in Section C, Statement of Work. It is anticipated that at least one award will be made in each Principle Task Area to a Partial Small Business Set-Aside (8(a), HUBZone, Service Disabled Veteran-Owned and Small Business Set-Aside). Awards shall be made to those Offerors whose proposal is determined to best meet the needs of the Government after consideration of all factors.

The Government, at its discretion, anticipates award of approximately two (2) to twelve (12) contracts as a result of this solicitation. This does not, however, commit the Government to making an award to any specific number or size of Offerors. Furthermore, it is not the Government's intent to award more than twelve (12) contracts. The Government will keep the number of awards to a reasonable amount, considering factors such as: maintaining enough vendors to ensure adequate competition, and providing readily-available sources for Task Orders throughout the contract life. This will avoid burdensome contract administration and proposal/evaluation processes for both industry and the Government; thus ensuring that successful Contractors have the opportunity to receive a meaningful level of work. The Government retains the right to make multiple awards in any of the set-aside categories if proposals are not received in any one of the particular set-aside categories.

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L.10 PRE-PROPOSAL/NETWORKING CONFERENCE

The Government does not plan to hold a Pre-Proposal Conference. If during the solicitation process it is determined that a pre-proposal conference is beneficial, Offerors will be notified of the time, date and place via the Internet at this address: <http://www.procurement.irs.treas.gov>. However, there will be a Networking Conference which will be held on July 14, 2004 in Lanham, MD. Advance registration is required and attendance is limited to the first 300 companies (one per company) who responded to the FedBizOpps announcement made in Group D on June 11, 2004 under TIPSS-3 Networking Conference (see <http://www.fedbizopps.gov> for more information).

L.11 REQUEST FOR PROPOSAL QUESTIONS AND COMMENTS

As soon as an Offeror is aware of any problems or ambiguities in interpreting the specifications, terms or conditions, instructions or evaluation criteria of this solicitation, the Contracting Officer identified in Section L, Service of Protest, shall be notified. Any objection to the RFP requirements must be communicated prior to delivery of a proposal. When connected to the IRS Procurement Internet site (<http://www.procurement.irs.treas.gov>), select the link "TIPSS-3 solicitation" for instructions on submitting questions/comments via the Internet site.

Only electronic submission of questions and comments will be accepted. They shall be submitted via the Internet site specified above. Please refer to the specific text of the RFP in the following format:

Subject: RFP No. TIRNO-04-R-00017, TIPSS-3
Reference: RFP Section ____, Paragraph(s) ____, Page(s) ____.

The Government will not provide any information concerning questions in response to telephone calls from Offerors. All requests will be answered electronically and provided to all Offerors at the Internet site. The formal RFP and related documents will be available electronically 24 hours a day via the Internet site referenced above. The file can then be downloaded in Microsoft Word '97 format.

L.12 FORMAT AND INSTRUCTIONS FOR PROPOSAL SUBMISSION

Proposals shall be prepared in accordance with these instructions; providing all required information in the format specified.

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A cover letter shall accompany the proposal to set forth any information that the Offeror wishes to bring to the attention of the Government. Each Offeror shall submit a proposal in three (3) separate volumes as follows:

VOLUME I: Terms and conditions in accordance with Section L, VOLUME I - TERMS AND CONDITIONS	Original and 4 hard copies and 2 electronic copies
VOLUME II: Technical Proposal in accordance with Section L, VOLUME II - TECHNICAL PROPOSAL	Original and 4 hard copies and 2 electronic copies
VOLUME III: Cost/Price and Financial Data Proposal in accordance with Section L, VOLUME III - COST/PRICE PROPOSAL AND FINANCIAL INFORMATION	Original and 4 hard copies 2 electronic copies

Each volume shall be submitted in separate loose-leaf binder(s). For each proposal package, the following information must be cited on the outside of each box and on the spine and cover of each binder:

- Solicitation Number:
- Offeror's Name
- Box ___ of ___ box(s) and Volume Number (The numbering scheme shall include all outside packages, e.g., information submitted under separate cover)

Each proposal volume shall include an index of that volume's contents that identifies major paragraphs and subparagraphs by number and descriptive title as well as the corresponding page numbers.

- (a) Proposals submitted in response to this solicitation shall be formatted in accordance with the instructions provided in this section. Offerors shall furnish the proposal in separately bound volumes in the quantities specified. Each volume shall be complete in itself in order that evaluation of one volume may be accomplished independently of, and concurrently with, evaluation of the other.

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- (b) Each page within each volume and section shall be numbered using a consistent numbering scheme. This scheme shall also be used for all supporting documentation such as charts, figures, etc. included in each volume.

Each volume including all supporting documentation shall be submitted in standard three ring loose-leaf binders. Paper size shall be 8 1/2 by 11-inch paper with printing on one side only. Blank sides and Part/Tab dividers do not count toward the page counts. The typewritten or printed letters shall be 12 point Arial. No reduction is permitted except for organization charts or other graphic illustrations. In those instances where reduction is allowable, Offerors shall ensure that the print is easily readable; no less than 8 point font on graphs and 10 point font on tables.

Offerors shall NOT use charts/tables/graphics to subvert page limits. Each page shall have adequate margins on each side (at least one inch) of the page. Header/footer information (which does not include any information to be evaluated) may be included in the 1" margin space. Fold outs for complete spreadsheets and/or organization charts are permissible up to 11" by 17", with printing on only one side, if secured with the volume. Large sheets (i.e., greater than 8 1/2 by 11 inch) shall count as two pages.

To be considered compliant and eligible for award, the proposal shall, at a minimum, include the information identified in Section L, and comply with the cited page limitations for each section.

In addition to the "paper" proposal, an electronic version is also required on a Compact Disk (CD). Offerors shall exercise great caution to assure that all disks submitted in response to this section shall be free of any computer viruses. If a disk is found to contain a virus the entire offer may be rejected.

- (c) Preferred file formats are as follows:

- (1) Text files (including charts, diagrams, and the like): Microsoft Word 97.
- (2) Spreadsheet files: Microsoft Excel 97.

"Pre-printed materials such as company annual reports submitted with Volume III, Cost/Price Proposal and Financial Information need not be submitted in electronic format.

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If discussions are held and the Offeror submits a proposal revision(s) as a result of discussions, the Offeror **MUST** submit with its final proposal revision an updated electronic version of its proposal that includes all changes, revisions and modifications made to the proposal during the course of the acquisition. This updated electronic proposal shall also be submitted on a CD using the same software as the initial electronic proposal.

A proposal that fails to show compliance with these instructions may be removed from the competition.

L.13 PROPOSAL/AWARD RESTRICTIONS

Offerors may submit more than one proposal if: (1) as both a prime and subcontractor or (2) as a subcontractor on more than one prime proposal. In addition, the Partial Small Business Set-Aside (8(a), HUBZone, Service Disabled Veteran-Owned and Small Business Set-Aside) Offerors may submit a proposal for both the Full and Open and the Small Business Set-Aside Competitions.

Parent and subsidiary corporations may submit a proposal on this procurement, but it is each Offeror's duty in these situations to establish why potentially awarding to both a parent or subsidiary or fellow subsidiaries would not violate the competitive process. The Offeror must establish how it is a separate entity, and how its corporate decisions are not influenced by a parent organization or fellow subsidiaries (reference Section H.15 Organizational Conflict of Interest and Limitation on Future Contracting).

L.14 VOLUME I - TERMS AND CONDITIONS

The following paragraphs prescribe the format of Volume I and describe the approach to be used in the development and presentation of the proposed data. They are designed to assure the submission of information essential to the understanding and comprehensive evaluation of each Offeror's proposal.

Each Offeror shall complete and submit requested data forms in accordance with Section I.3.1 – Qualifications Requirements, paragraphs (b) and (c).

The Offeror shall submit the original and four (4) hard copies of Volume I.

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L.14.1 EXCEPTIONS, DEVIATIONS AND CONDITIONAL ASSUMPTIONS

The Offeror shall identify and explain any exceptions or deviations taken or conditional assumptions made with respect to the requirements of this solicitation. Any exceptions or deviations taken or conditional assumptions made must contain sufficient amplification and justification to permit evaluation. Specifically, the Offeror shall summarize each technical or cost and other exceptions taken elsewhere and provide specific cross-references to its full discussion. Also, the benefit to the Government shall be explained for each exception or deviation taken, or conditional assumption made. Such exceptions, deviations, or conditional assumptions will not, of themselves, automatically cause a proposal to be termed unacceptable. However, a large number of exceptions, or one or more significant exceptions not providing benefit to the Government may result in rejection of the offer as unacceptable.

L.14.2 SECTION A - COVER SHEET

The Offeror shall include a fully executed SF 33, as appropriate. The SF 33 shall be signed by an official authorized to bind the Offeror's organization. The SF 33 containing the original signature shall be included in the binder marked as the original.

L.14.3 REPRESENTATIONS, CERTIFICATION AND AGREEMENT WITH TERMS AND CONDITIONS

The Offeror shall indicate its acceptance of all requirements and terms and conditions of the solicitation. Section K shall be fully executed and a copy included in each copy of Volume I provided.

Upon contract award, the successful Offerors completed representations, certifications, and other statements of the Offeror will be incorporated into the contract by reference under Section H of the contract.

L.14.3.1 OFFER ACCEPTANCE PERIOD

The Offeror's acceptance period shall be no less than 120 calendar days from the date specified for receipt of offers, unless another date is specified in an addendum to the solicitation.

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L.14.4 IRS CAPABILITY MATURITY MODEL (CMMI®) REQUIREMENTS

L.14.4.1 PRE-AWARD CMMI® VALIDATION

The goal of the Capability Maturity Model Integration® (CMMI®) validation effort is to validate that Contractors selected to perform IRS software development work are capable of practicing the Software Engineering Institute (SEIsm) CMMI Level 2 maturity.

The source selection practice as suggested by the SEI recommends that the procuring agency field a Standard CMMI Appraisal Method for Process Improvement^(sm) (SCAMPI^(sm)) team to determine prospective software development Contractors' CMMI process maturity level. This is a very time-consuming, labor-intensive process and is not practical for multiple award acquisitions that are expected to consider many vendors. The objective of this approach is to provide a means of validating Contractor process maturity within the time constraints of the acquisition.

Large Business Offerors and Small Business Offerors, who elect to compete under the full and open competition, shall provide evidence of process maturity in accordance with the IRS Policy and Procedure 39.1(B) Capability Maturity Model for software through the submission of SCAMPI results.

L.14.4.2 DATA SUBMISSION REQUIREMENTS

Data submitted by Offerors may vary depending on whether the Offeror seeks award under the full and open competition or the partial small business set-aside competition. Offerors who elect to compete under the full and open competition must provide a letter of intent stating they understand the requirement to be CMMI level 2. The letter shall be submitted with the proposal, compliance of the CMMI requirement must be completed by November 29, 2004.

Offerors proposing under the full and open competition shall submit data from at least, one external SCAMPI, but no more than three, that demonstrates software development compliance with SEI's Staged CMMI Version 1.1. The submission material shall be dated within 12 months from the first day of the on-site period to the proposal due date to include the following information:

- Names, titles, organizational affiliation, address, phone number, and credentials of the external evaluation team.

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- Detailed final findings report and briefing Organizational chart showing affiliation of evaluated organization and proposing organization and number and type of staff associated with each component represented by the organizational chart.
- Project profiles for each project evaluated providing details on the attributes of the projects: project description, application domain, software size, life cycle, project schedule, current phase of the project, and staffing profile.
- On-site period dates of performance and interview schedule detailing names, roles, and organizational affiliations of individuals interviewed Offerors proposing under the Partial Small Business Set-Aside (SBSA) have two (2) options:

(1) SBSA (8(a), HUBZone, Service Disabled Veteran-Owned and Small Business Set-Aside) Offerors may validate their SEI CMMI Level 2 status by providing the same CMMI information required for proposing under the full and open competition; or alternatively,

(2) SBSA Offerors may choose to defer validation of their SEI CMMI Level 2 status until after contract award.

SBSA Offerors should carefully consider the advantages and disadvantages of their choice. A bidder that does not have current assessment data to submit may defer the expense of an assessment until after contract award. However, the IRS will not issue any software development tasks to any Contractor until the IRS CMMI Review Team has validated that the Contractor's software development process maturity is CMMI Level 2 or better. If the Contractor chooses to defer process maturity validation, the amount of time after contract award that the Contractor is ineligible to receive software development tasks may be substantial.

L.14.4.3 CMMI LEVEL 2 VALIDATION

Each Offeror's submission will be validated by members of the IRS CMMI Review Team. The estimated completion time for each validation is no longer than 2 to 3 days per Offeror.

Acceptance Criteria: The SCAMPI information submitted is validated against established criteria and must clearly indicate:

- the offeror is at a minimum, a CMMI Level 2 organization
- was performed within 12 months from the first day of the on-site period to the proposal due date

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- was performed on the proposing organization
- was performed in accordance with Assessment Requirements for CMMI Version V.1.1 (ARC)
- examined at least 3 projects covered, in the aggregate, at least 20% of the technical workforce proposed for software development.
- used SEI framework: CMMI v 1.1 or later
- considered at least all process areas in Level 2 such as Requirements Management, Software Project Planning, Software Project Tracking and Oversight, Software Subcontract Management, Software Quality Assurance and Software Configuration Management (the software subcontract management process area may be outscoped if the proposing organization does not propose to use subcontractors for any portion of the software effort)
- all Level 2 process areas were evaluated as “fully satisfied”
- was performed by qualified external assessors; specifically:
- all appraisal team members were SEI trained and certified in the Introduction to CMMI (Staged Representation) course and Intermediate Concepts of CMMI.
- at least one member of the appraisal team has completed and is licensed and certified by the SEI as a SCAMPI Lead Appraiser (certificates for appraisal team members is required including the SEI SCAMPI Lead Appraiser number)

L.14.4.4 INSTRUCTIONS TO OFFERORS – SOFTWARE DEVELOPMENT PREREQUISITE (APR 2002)

1. In accordance with Clause 1052.239-9005, the proposal shall include the following evidence of SW-CMM[®] maturity, if the offeror is using the SW-CMM model:
 - a. The current SW-CMM level of the organizational component which the offeror proposes to perform the work;
 - b. Description of how the SW-CMM rating was determined;
 - c. The period of the appraisal on-site (from mm/dd/yyyy to mm/dd/yyyy) and date the appraisal rating was received;
 - d. Software Capability Evaluation (SCESM) report, if applicable;

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- e. CMM-Based Appraisal for Internal Process Improvement (CBA-IPI) report, if applicable;
 - f. Organizational chart, with accompanying descriptions, depicting the number and types of software projects occurring within the proposed organization;
 - g. Profiles of the projects included in the SCE or CBA-IPI, as applicable;
 - h. The name and organizational affiliation of the Lead Evaluator or Lead Assessor, the SEI authorized identification number of the Lead, and the telephone number of the SCE Lead Evaluator or the CBA-IPI Lead Assessor, as applicable.
2. In accordance with Clause 1052.239-9005, Alternate 1, the proposal shall include the following evidence of the offeror's CMMI-SW Level, if the offeror has elected to migrate from SW-CMM to CMMI-SW or is using only the CMMI-SW model.
- a. The current CMMI-SW Level of the organizational component that the offeror proposes to perform the work;
 - b. Description of how the CMMI-SW Level was determined;
 - c. The period of the appraisal on-site (from mm/dd/yyyy to mm/dd/yyyy) and date the appraisal rating was received;
 - d. The Standard CMMI Appraisal Method for Process Improvement - SCAMPISM (ARC Class A) report, if applicable;
 - e. The Software Capability Evaluation (SCESM) report, if applicable;
 - f. Organizational chart, with accompanying descriptions, depicting the number and types of software projects occurring within the proposed organization;
 - g. Profiles of the projects included in the SCAMPI (ARC Class A) or SCE, as applicable;
 - h. The name and organizational affiliation of the Lead Evaluator or Lead Appraiser, the SEI authorized identification number of the Lead, and the telephone number of the SCE Lead Evaluator or the SCAMPI Lead AppraiserSM, as applicable.

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L.14.5 SUBCONTRACTING PLAN

The Subcontracting Plan is to be completed by Large Business Offerors only and is to be provided to the Government in Volume I. Refer to Attachment J.5, Department of the Treasury Small, HUBZone Small, Small Disadvantaged and Women-Owned Small Business Subcontracting Plan Outline.

All Large Business Offerors shall also submit SF295 forms for the last three Fiscal Years. If SF295 forms are not available for the last three Fiscal Years, the contractor shall submit a detailed explanation as to why they are not available and shall submit as many SF295 forms as they can up to three.

L.14.6 SMALL BUSINESS UTILIZATION PARTICIPATION

This solicitation contains two relevant sample forms: one entitled "Identification List of Small Disadvantaged Business Firms in targeted NAICS Codes Projected to be used on this contract", and one entitled "Summary Sheet for Cumulative Target NAICS SDB Data by Category." Each Offeror is required to submit all of the information required on both of these forms, either using these specific forms, or developing an alternate format which contains all the information requested on both sample forms provided. See Attachment J.16 and J.17 for sample forms.

L.15 VOLUME II - TECHNICAL PROPOSAL

The following paragraphs prescribe the format of Volume II and describe the approach to be used in the development and presentation of the proposed data. These instructions are designed to assure the submission of information essential to the understanding and comprehensive evaluation of each Offeror's proposal.

The Offeror shall submit one (1) original and two (2) hard copies of Volume II. The Offeror shall also submit an electronic copy of Volume II in Microsoft Word 6.0 and/or Excel 5.0 or later version formats on a 12 cd-r. The only exceptions are attachments to the proposal which may not be available in electronic form

Large Business Offerors and Small Business Offerors who elect to compete under the full and open competition shall submit a proposal for the Information Systems Services task area **and** may submit a proposal for any or all of the two (2) other task areas.

Small Business Offerors who submit a proposal under the partial small business set-aside shall submit a proposal for any or all of the three (3) task areas.

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L.15.1 FORMAT

Volume II of the proposal shall consist of the sections described in Section L, CONTENT. NO PRICING DATA SHALL BE SUBMITTED IN THIS VOLUME.

Prospective offerors are asked to consider that all material submitted must be directly pertinent to the requirements of the Request for Proposal including page limitations. Extraneous narratives, elaborate brochures, uninformative "Public Relations" material, and so forth, shall not be submitted.

Volume II pages shall be numbered and shall be submitted on 8 1/2 by 11 inch paper with printing on one side only. Blank sides and Part/Tab dividers do not count toward the page counts. The typewritten or printed letters shall be 12 point, with no reduction permitted except organization charts or other graphic illustrations; in those instances where reduction is allowable, Offerors shall ensure that the print is easily readable, no less than 8 point font is acceptable. Offerors shall NOT use charts/tables/graphics to subvert page limits. Each page shall have adequate margins on each side (at least one inch) of the page. Header/footer information (which does not include any information to be evaluated) may be included in the 1" margin space. Fold outs for complete spreadsheets and/or organization charts are permissible up to 11" by 17", with printing on only one side, if secured with the volume. Large sheets (i.e., greater than 8 1/2 by 11 inch) shall count as two pages.

L.15.2 CONTENT

Each Offeror shall submit their technical proposal in four (4) separate technical sections as listed below. Each section shall be able to stand on its own merit and be modular in nature. Page limitations, if any, exclude materials that do not contain information to be evaluated or assist evaluators in reviewing the proposal (e.g., table contents, glossary, etc.).

- **TECHNICAL SECTION A – PROJECT PROFILES**
- **TECHNICAL SECTION B – MANAGEMENT APPROACH**
- **TECHNICAL SECTION C – RESUMES**
- **TECHNICAL SECTION D – ORAL PRESENTATIONS**

Offerors are cautioned that in conducting its evaluation, the Government may use data provided by the Offeror in its proposal as well as data obtained from other sources. While the Government may elect to consider data obtained from other sources, the burden of providing thorough and complete information rests with the Offeror.

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TECHNICAL SECTION A – PROJECT PROFILES (See L.15.3).

Full and Open Competition - Per Principle Task Area:

Project Profiles - not to exceed 10 pages each, 5 profiles required = 50 pages maximum.

Maximum Per Principle Task Area = 50 pages.

Partial Small Business Set-Aside - Per Principle Task Area:

Project Profiles - not to exceed 10 pages each, 3 profiles required = 30 pages maximum.

Maximum Per Principle Task Area = 30 pages.

TECHNICAL SECTION B –MANAGEMENT APPROACH (See L.15.4)

Full and Open Competition

Management Approach - not to exceed 15 pages (1 slide per page).

Maximum in proposal = 15 pages.

Partial Small Business Set-Aside

Management Approach - not to exceed 15 pages.

Maximum in proposal = 15 pages.

TECHNICAL SECTION C – RESUMES (See L.15.5)

Full and Open Competition

- Key Management (KM) Résumés - not to exceed 2 pages each, 4 résumés = 8 pages maximum.
- Back-up KM Résumés -not to exceed 2 pages each, 4 résumés = 8 pages maximum

Maximum in proposal = 16 pages.

Partial Small Business Set-Aside

- Key Management Résumés - not to exceed 2 pages each, no more 4 résumés = 8 pages maximum.

Maximum in proposal = 8 pages

Page limitations, with exception to materials that do not contain information to be evaluated or assist evaluators, e.g., table contents, glossary, etc., are as follows:

L.15.3 TECHNICAL SECTION A – PROJECT PROFILES

All Offerors are required to provide hard copy project profiles. Project Profiles demonstrate Offerors' technical capability in performing work at the task order level.

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Project Profiles shall demonstrate the Offeror's capability to provide adequate technical support teams, project management, tools and facilities, and corporate oversight to support the requirements of the contract. Project Profiles shall demonstrate an Offerors' technical capability to perform work similar to that required by TIPSS-3, at the project and/or Task Order level, as that described in the Principle Task Areas.

Each Project Profile shall include a description of the type of contract, dollar value/level of effort, the technical and operational approach, allocation of resources/labor categories, place(s) of performance, and general description of requirements of the project/task and if the Offeror performed the work as the Prime or a Subcontractor. Each Offeror is required to identify the tasks, key management personnel, and technical labor categories that demonstrate the Offeror's experience is relevant to the Principle Task Areas as described in Section C.

Considerations for relevancy will be:

- Work of the type described in the Principle Task Areas;
- Multiple Task Order Environment / Task Order Type;
- Work performed within the last three years;
- Level of Effort > 6000 hours and/or value of task >\$350,000 (F&O);
- Level of Effort > 4000 hours and/or value of task >\$250,000 (SB);
- Work performed in multiple geographical locations;
- Dedicated Project/Program Management Office; and
- Knowledge and Skill with Hardware/Software/Systems in Section J.

Project Profiles shall demonstrate the Offeror's ability to provide personnel on the technical support teams with the skills, practical experience, and capability to perform the requirements of the task, including recruiting and retaining qualified personnel sufficient to meet the requirements of the project/task to include security clearances. Additionally, Project Profiles will demonstrate the Offeror's ability to draw from the resources as required to meet the requirements of the project/task and the ability to meet surge requirements for quick reaction tasks.

Project Profiles shall demonstrate the Offeror's approach in providing a Program Management team with the authority, ability, and freedom to quickly identify resources, acquire their support, and readily allocate them. Project Profiles shall demonstrate the project/task team's relationship to corporate headquarters and to the proposed IRS Program Management Team.

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Project Profiles shall describe the software tools used in the performance of the project/task and the relevance to IRS, including but not limited to testing, processing, communication tools and equipment and user's skills.

Project Profiles shall describe the Offeror's proposed methods and plan in ensuring sufficient facilities and equipment (e.g. GFP, GFE, and CFE) were available as required in meeting the requirements of the project/task.

Project Profiles shall describe the schedule controls, timeliness of the effort, and quality control plan, addressing methodologies used to satisfy the requirements of the project/task.

L.15.3.1 FULL AND OPEN COMPETITION

Offerors who elect to compete under full and open competition shall identify and provide five (5) project profiles for each task area proposed as specified below. Project Profiles shall be divided by specialized task area and separated with a divider clearly labeled with the specialized task area name. No project profile shall exceed ten (10) pages.

At least one project profile from each specialized task area shall reflect the Offeror's (Prime contractor's) experience. At least one project profile from each specialized task area shall reflect the Offeror's (Prime contractor's) utilization of a Small Business partner or subcontractor relationship. If the Offeror has identified that a subcontractor will be used to satisfy the majority of requirements in a specific task area, at least one, but no more than two, of the project profiles submitted for that task area shall cite the proposed subcontractor's experience.

The remaining project profiles may be comprised of experience gained by the Offeror (Prime contractor) or subcontractor.

The experience reflected in the project profiles may have been gained from providing support to Government agencies (federal, state or local) or commercial entities. Contracts/task orders cited in the project profiles must have been completed or in progress during the last three (3) years.

The Offeror's proposal shall include specific documentation and/or verifiable references supporting their response.

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L.15.3.2 SMALL BUSINESS COMPETITION

Offerors eligible to compete under small business shall identify and provide three (3) project profiles as specified below. Project Profiles shall be divided by task area and separated with a divider clearly labeled with the task area name. No project profile shall exceed ten (10) pages.

At least one project profile from each task area shall reflect the Offeror's (Prime contractor's) experience. If the Offeror has identified that a subcontractor will be used to satisfy the majority of requirements in a specific task area at least one of the project profiles submitted for that task area shall cite the proposed subcontractor's experience.

The experience reflected in the project profiles may have been gained from providing support to Government agencies (federal, state or local) or commercial entities. Contracts/task orders cited in the project profiles must have been completed or in progress during the last three (3) years.

The Offeror's proposal shall include specific documentation and/or verifiable references supporting their response.

L.15.3.3 GENERAL INFORMATION/FORMAT

Each project profile shall include:

- (1) Contract/Task Order Title;
- (2) Contract/Task Order Number;
- (3) Contract/Task Order Period of Performance;
- (4) Contract/Task Order Value;
- (5) Contract/Task Order Type (e.g., FFP, CPFF, T&M, other);
- (6) State whether the project profile reflects the Offeror's (Prime contractor) or subcontractor experience;
- (7) If subcontracting support was utilized, state the type of support subcontracted and the percentage of the contract/task order subcontracted;

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- (8) Geographic distribution of services (i.e., Local, Nationwide, Worldwide);
- (9) Name, address, telephone number and electronic mail address of the customer, (If Government experience, provide the name and telephone number of the Contracting Officer's Technical Representative (COTR) and the Contracting Officer (CO). If commercial experience, provide the name, telephone number and electronic mail address for the technical and contracting equivalent). Also, include the name, telephone number and electronic mail address for alternate parties;
- (10) Description of any claims or litigation between the Offeror and the client or customer concerning a particular contractual agreement or account, and the outcome of such claims or litigation if resolved; and
- (11) Brief description of the Contract/Task Order requirements and the relevancy to this acquisition. Describe:
 - major accomplishments;
 - difficulties or problems encountered, actions initiated by the Offeror to overcome the difficulties and resolve the problems, and the results of such actions;
 - challenges and how the Offeror responded to the challenge;
 - lessons learned; and
 - situations where the Offeror met the requirements of the project through innovation and resourcefulness.
 - ramp-up (staffing)
 - capabilities in implementing Performance Based task orders

L.15.4 TECHNICAL SECTION B – MANAGEMENT APPROACH

The Offerors shall describe how they will organize, staff, and manage the project. Offerors shall submit one Management Approach inclusive of all Task Areas they are submitting a proposal under. Further explanation of each evaluation factor is detailed below.

L.15.4.1 PROGRAM/PROJECT MANAGEMENT

This section shall describe the Offeror's understanding of the Program and Project Management requirements of this solicitation, the techniques for tracking and managing multiple task orders awarded under this solicitation, and a plan for managing the

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contract after a sustained award. The Offeror's proposal will be considered with respect to the quality and soundness of business practices for performing and monitoring task orders issued under TIPSS-3. The Offeror shall also address quality measures and follow-up procedures.

L.15.4.2 RECRUITMENT AND RETENTION

In this section of the Management Approach, the Offeror shall identify the recruitment, retention, and workforce improvement processes and procedures to be implemented under and utilized throughout the entire term of the contract in order to satisfy the requirement. This section shall reflect how the Offeror intends to attract, retain, and continually improve a quality workforce. At a minimum, the plan shall address staffing and workforce improvement.

L.15.4.3 STAFFING

The Offeror shall describe the strategy and methods to be employed to provide a fully qualified initial workforce at contract award. This section shall describe current staff and hiring procedures; methodology for maintaining current staff (i.e., incentives and award programs); acquiring required staffing levels and additional staffing on an ongoing basis, resource turnover, transitioning personnel (phase in/phase out) and utilization of subcontractors.

The Offeror shall describe the methodologies utilized to replace employees lost through attrition during the term of performance. The Offeror shall specifically address plans to employ sufficient qualified staff to support the base year projected in Section B, SERVICES AND PRICES.

The Offeror's proposal shall demonstrate an understanding of the difficulties sometimes encountered in recruiting and retaining personnel for work in areas outside the Washington, DC metro area (e.g., Detroit, MI., Martinsburg, WV, and Memphis, TN). Recruitment of additional qualified personnel to handle an increasingly complex and diversified workload shall also be addressed. This section shall also address how the Offeror would recruit for any additional skills not currently required by the solicitation but which might be required because of technological advancements requiring the addition of new labor categories during the term of the contract.

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L.15.4.4 COST/SCHEDULE CONTROL

The Offeror shall describe the cost and schedule management procedures to be used for this contract. Cost Management and Schedule Management shall be described separately.

L.15.4.4.1 COST MANAGEMENT

The Offeror shall indicate what mechanisms are used to control direct and indirect costs and to notify the Government of potential contract overruns/underruns. The Offeror shall provide information on the accuracy of their estimated cost forecasting as well as cost containment measures that have proved to be quantifiably successful (i.e., the Offeror's ability to successfully complete contract performance within the established cost ceiling of the contract).

L.15.4.4.2 SCHEDULE MANAGEMENT

The Offeror shall describe the scheduling methodology used and company policies for deviation and problem resolution. The Offeror's description shall include the method of establishing baselines and determining variances.

L.15.4.5 ORGANIZATIONAL STRUCTURE

The Offeror shall describe their organizational structure as required below and lines of authority as they pertain to this particular effort. This description shall, at a minimum, describe the current personnel base and provide an organizational chart and supporting documentation.

L.15.4.5.1 CURRENT PERSONNEL BASE

The Offeror shall describe their current personnel base, including the number and labor categories of personnel currently employed on a permanent basis by the Offeror and those additionally available during peak load periods on a temporary basis. If subcontractor or other outside resources are included in the current personnel base, the rationale and mechanism for inclusion, and the actual number of subcontractor personnel shall be addressed.

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L.15.4.5.2 ORGANIZATIONAL CHART AND DESCRIPTION

The Offeror shall describe the management and administrative organization available for the management of the services required under the proposed contract. The Offeror shall include a functional organizational chart by job classification which shall include key management personnel, management staff, technical staff, and other support staff. The Offeror shall describe the lines of authority and should reflect the degree of authority each position will exercise in managing the resources (including subcontractors).

L.15.4.6 SUBCONTRACTOR MANAGEMENT

In this section of the proposal, the Offeror shall identify the type and level of support that will be obtained from subcontractors. The Offeror shall provide a rationale concerning, and a policy for, subcontracting. The Offeror shall reflect how the need for subcontracting is identified, and the process for coordination and integration of the subcontractors' efforts into those of the Offeror. The Offeror shall identify the methods to be used to oversee the subcontractors' performance, with specific attention to how the Offeror will verify that the subcontractors' efforts satisfy the requirements of task order.

L.15.5 TECHNICAL SECTION C – RESUMES

Offerors shall identify the key personnel (as described in Section C.5.1.1, C.5.1.2, C.5.1.3, C.5.1.4) their organization will commit to support the TIPSS-3 project. Resumes submitted shall describe roles, responsibilities, and relationships to the contract.

Resumes shall be submitted with the original Proposal for each of the Key Management Personnel designated by the Government or the Offeror in Special Contract Requirement Section H, KEY PERSONNEL. Resumes shall be submitted according to Section L.12.2 CONTENT (TECHNICAL SECTION C – RESUMES). Individuals so designated must be available for use under TIPSS-3 at the time of contract award. As a minimum, resumes shall include the following:

- Name of person;
- Functional Responsibility;
- Education (including, in reverse chronological order, colleges and/or technical schools attended (with dates), degree(s)/certification(s) received, major field(s) of study, and approximate number of total class hours);
- Citizenship status;


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- Experience (including, in reverse chronological order, area(s) of work in which a person is qualified, company and title of position, approximate starting and ending dates (month/year), concise descriptions of experience for each position held including specific experience related to the requirements of the position, specific experience on projects of similar size/scope/complexity/functionality, and specific experience related to the task area(s) of the TIPSS-3);
- Certification that the information contained in the resume is correct and accurate (including signature of key person and date signed and signature of higher authority and date signed).

The Offeror will provide backup resumes to substitute personnel with relevant experience, if necessary, to replace a key person leaving the organization.

 The factors for Management Approach (L12.4) are the factors that the government will use in evaluating key personnel resumes.

L.15.6 TECHNICAL SECTION D – ORAL PRESENTATIONS

Upon completion of the technical evaluations on Technical Sections A, B and C, a Competitive Range will be established. All those Offerors within the Competitive Range will be notified by the Contracting Officer and an amendment to the RFP will be issued with instructions on the Oral Presentations.

L.16 VOLUME III - COST/PRICE PROPOSAL AND FINANCIAL INFORMATION

The Government reserves the right to verify/follow-up on any of the information presented in Volume III of the proposal. This volume of the proposal shall consist of the following for the Prime Contractor:

L.16.1 COST/PRICE PROPOSAL

The Offeror shall submit in Microsoft Excel format four (4) hard copies and two (2) electronic copies of Sections B.2 thru B.6 CPFF Services and Prices and T&M Hourly Labor Rates. The Offer shall also submit a grand total summary sheet that totals the base year and all option years. Offerors shall submit a cost proposal for each of the Principle Task Areas proposed (for the Cost Plus Fixed Fee (CPFF) portion and a fully burdened fixed hourly rate for the Time & Material and Fixed Price Portion of Section B. The Government's estimate of general labor categories and quantities of hours associated with each year of the contract(s) can be found in Section J.6 Labor

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Categories and Hours. These estimates shall be used for the purposes of developing the cost evaluation for both the CPFF portion of Section B and the T&M Labor Rate portion of Section B. The Offeror shall assume an even distribution of labor hours over the months of each year. The starting point must be a single base labor hour rate for each labor category proposed multiplied by the respective estimate of hours for that Category.

The Offeror shall clearly state their methodology for deriving labor category rates proposed in sufficient detail for the Government to determine cost realism. Supporting documentation should be submitted by the Offeror to explain the basis of these rates. This documentation should include the most detailed information currently available to the Offeror. To the greatest extent possible, the rates should be based upon current experienced rates, forward pricing rates, and the like. These rates should not be based upon general market surveys, or the like. If forward pricing rates are utilized, documentation in support of labor rates from the Defense Contract Audit Agency (DCAA) or the Administrative Contracting Officer (ACO) may be requested by the government. The estimates contained in Section J, Labor Categories and Hours are for evaluation purposes only and should not be construed as limitations on types or quantities of labor that may be subsequently acquired under TIPSS-3 contracts. The hours are for proposal evaluation purposes only and do not commit the government.

L.16.1.1 LABOR ESCALATION

Offerors shall submit supporting rationale for the escalation applied or not applied to prices in the option years.

L.16.2 FEE

Show the total amount of proposed fixed fee and its respective percentage of the total estimated cost in the CPFF portion of Section B.

L.16.3 FINANCIAL INFORMATION

The Offeror shall include the following information with regards to financial capability. Audited financial statements complete with notes or, if not available, tax returns for two most recent fiscal years. Include most recent interim financial statements. Vendor/lender financing agreements including amounts outstanding and names/phone numbers of account representatives. Include dollar amounts and descriptions of outstanding liens or judgments and backlog of deliveries broken down by Government and Commercial sectors and by quarter for the first six quarters of the contract period.

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L.17 SMALL BUSINESS OFFERS

For the purpose of this contract, NAICS Code 541512 and the following standard applies: "a concern is small if its average annual receipts for its preceding three (3) fiscal years do not exceed \$21.0 million dollars."

Subcontracted work need not be classified as NAICS Code 541512. It should be classified under whatever NAICS Code is appropriate for the work. The size standard for that NAICS Code can be used to determine if subcontracting goals are met. A Small Business Offeror submitting a proposal in the Full and Open competition shall compete equally with all other Full and Open competition Offerors.

A Small Business Offeror submitting a proposal in the Partial Small Business Set-Aside competition shall compete equally with all other Partial Small Business Set-Aside Offerors in the Partial Small Business Set-Aside competition.

EXAMPLE: If Offeror XYZ (Small Business) submits a proposal in the Partial Small Business Set-Aside competition as a prime and is offered as a Subcontractor in Offeror ABC's (Medium Sized Business) in the Full and Open competition then the Government will NOT accept ABC's proposal OR XYZ's proposal.

L.18 ALTERNATE PROPOSALS

OFFERORS ARE CAUTIONED AND WARNED THAT NEITHER ALTERNATE NOR MULTIPLE PROPOSALS WILL BE ACCEPTED OR EVALUATED.

Each Offeror may submit only one technical and Cost/Price proposal.

Offerors should submit the proposal which sets forth their "best approach" to meet the requirements of the solicitation. The Government will not accept alternate proposals; submission of any alternate proposal will result in the Offeror being eliminated from further award consideration.

L.19 CRITERIA FOR SUBMISSION OF COST OR PRICING DATA

If a resulting contract meets the criteria expressed in FAR 15.403-4, for submission of Certified Cost or Pricing Data, the Offeror shall be required to submit one (1) completed

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certificate as soon as practicable after agreement is reached on the contract price. (See Attachment J.13)

L.20 PROPOSAL PREPARATION COSTS

This Request For Proposal does not commit the Government to pay any costs incurred in the submission of any proposal or in making necessary studies for the preparation thereof. Nor does it commit the Government to procure or contract for said services. The Contracting Officer is the only individual who can commit the Government to the expenditure of public funds in connection with this proposed procurement.

L.21 ACCEPTANCE OF PROPOSALS

The Government reserves the right:

- (a) To consider as acceptable only those proposals submitted in accordance with Section L and which demonstrate an understanding of the complexity involved and scope of this solicitation.
- (b) To reject, as unacceptable, proposals deleting or altering technical requirements which are considered by the Government not to be beyond the state of the art or impossible to attain and/or those proposals that are not prepared in the format described elsewhere in this section.

L.22 DELETIONS OF CONFLICTING CONDITIONS

In submitting a proposal it is necessary that the Offeror delete, or by explicit language exclude, any conditions (preprinted or otherwise) appearing on the Offeror's letterhead or on the reverse thereof which may be in conflict with any of the general or special conditions contained in this Request for Proposal. Failure to eliminate such conflicting conditions may result in the rejection of the proposal as nonresponsive.

L.23 PROPOSALS NOT SELECTED

Non-selection of any proposal will mean that another acceptable proposal(s) was/were deemed to be more advantageous to the Government, or that no proposal was accepted. Offerors whose proposals are not accepted will be so notified. Unsuccessful

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Offerors may request a debriefing concerning the perceived strengths, weaknesses, and deficiencies of their proposal relative to the Government expectations.

After a selection and contract award(s), unsuccessful proposals will be disposed of as follows: the Contracting Officer will retain one copy of each proposal and the remainder will be destroyed. Destruction certification will not be furnished.

L.24 ANNOUNCEMENT OF AWARD

Announcement of contract awards will be made in accordance with FAR 15. Announcement will also be published in the Federal Business Opportunities (FedBizOpps) in accordance with FAR 5.303.

L.25 RETURN OF OFFERS

It is important that the offer is sealed and the outer envelope or wrapping of the offer is addressed as follows:

FROM: Offeror's Return Address

TO: Internal Revenue Service
Robert W. Niedzwiecki, Contracting Officer
Constellation Centre, Suite 500 (OS:A:P:C:T:C)
6009 Oxon Hill Road
Oxon Hill, MD 20745

SOLICITATION NO.: TIRNO-04-R-00017, TIPSS-3

DATE: WEDNESDAY, AUGUST 18, 2004

TIME: 2:00 PM (OXON HILL, MD LOCAL TIME)

(NOTE: Failure to so mark the outer cover could be the cause of the offer being misdirected and received too late at the required destination.)

Offers sent through the U. S. Mail (including U. S. Postal Service Express Mail Next Day Service - Post Office to Addressee) must be addressed to the place specified in Standard Form 33, Block 7. All hand-carried offers including those made by private delivery services (e.g., Federal Express and Airborne Express) must be delivered to the

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office cited in Standard Form 33, Block 7. Hand-carried offers must be delivered to the above office by the time and date specified in Standard Form 33, Block 9. IRS personnel are not available to receive hand-carried offers except during normal working hours, 8:00 AM - 4:30 PM, Monday through Friday, excluding federal holidays. Offers received at destination after time and date specified for receipt will be considered LATE. The burden of timely receipt is upon the Offeror.

(End of Section)